

## **EXHIBIT D**



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# What to Expect (and Not Expect) From OpenAI and Jony Ive's AI-Centric 'Screenless Phone'

Here's everything we know so far about the mysterious upcoming AI device from the iPhone designer and creator of ChatGPT.



**Katie Collins**

May 24, 2025 7:36 a.m. PT

4 min read





Jony Ive and Sam Altman.

io

AI is coming for your phones -- this you know by now and maybe you've already experienced it for yourself in the form of Apple Intelligence or Google's Gemini.

But OpenAI, maker of ChatGPT and perhaps the biggest name in AI software and services right now, is making a different bet. It's looking beyond the traditional smartphone and thinking about how AI might reinvent our devices altogether.

On Wednesday, the company announced that it had bought Jony Ive's device startup IO for \$6.5 billion. Together, Ive and Altman are building something new -- a device unlike anything we've owned before, with AI at its core.

"It became clear that our ambitions to develop, engineer and manufacture a new family of products demanded an entirely new company," the pair said in a statement about their working relationship. "The IO team, focused on

developing products that inspire, empower and enable, will now merge with OpenAI to work more intimately with the research, engineering and product teams in San Francisco."

Ive is the visionary veteran Apple designer, who together with Steve Jobs created the iPhone, along with a long list of Apple devices. Now he's turned his attention to creating a fresh device category, which has clearly piqued the interest of Altman. Ive's startup has reportedly been working on a "screenless phone" -- although other reports suggest it's actually not a phone at all.

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Rumors of this mysterious AI-focused device have been circulating for months but Ive and Altman are keeping a tight lid on the details, fearing that a competitor may try to beat them to market.

So, for now, we'll just have to imagine.

The obvious existing point of comparison is the Humane AI Pin, an AI-specific device designed to be worn clipped to your collar. It launched to much fanfare in February 2024, but turned out to be a spectacular failure, creating a lasting air of pessimism around the entire idea of AI devices.

"It is unsurprising that there is skepticism about this type of product, particularly in the context of the high-profile failure of the Humane AI, which captured the imagination of tech enthusiasts, including me, but turned out to be a classic example of over-promising and under-delivering," said Ben Wood, chief analyst at CCS Insight.

The combination of Ive and Altman though, is full of potential. "It would be foolish to bet against Jony Ive, given his remarkable track record of delivering products that disrupt a market," said Wood.

"I have a growing sense that everything I have learned over the last 30 years has led me to this moment," Ive said in a YouTube video in which the pair talk about their friendship.



Their challenge, says Thoman Husson, VP principal analyst at Forrester, "is not just to use AI to enhance existing tasks, but to invent new products and experiences."

That said, OpenAI's ambitions for its AI devices are that it's able to ship 100 million units -- a bold bet for a software company entering the hardware space for the first time, with no pre-established supply chain.

"Jony Ive is an exceptional designer but smartphones (and hardware) is a volume play about scale and scope," said Husson. "I think Apple is still best placed to win this marathon race."

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## A wearable? Glasses? A phone? Perhaps not

In the absence of any substantial hints or clues, we remain for now in the dark as to what this first piece of OpenAI hardware will look like, how it will function and how it will fit into our lives.

There's been some speculation, based largely on claims made by reliable Apple analyst Ming-chi Kuo, that the OpenAI device will be a wearable. In a social media post, Kuo said the product was designed to be worn around the neck and was "as compact and elegant as an iPod Shuffle."

This would indicate that Altman and Ive are taking a different approach to Meta, which has gone all in on smart glasses. Meta CEO Mark Zuckerberg has said the glasses are the ultimate AI device, because of their ability to receive

and deliver information in close proximity to your eyes and and ears.

But we should also be prepared for the possibility that Altman and Ive's device isn't a wearable at all. According to the Wall Street Journal, Altman said Ive was skeptical about the idea of AI wearables, making it sound unlikely that he would embrace them as part of this project.

Citing a briefing given by Altman to OpenAI employees, the WSJ reports that the device "will be unobtrusive, able to rest in one's pocket or on one's desk, and will be a third core device a person would put on a desk after a MacBook Pro and an iPhone."

It's curious to see the OpenAI screenless phone being discussed this way, almost as if it falls within Apple's specific family of products. The WSJ said Altman is envisaging in the long term "a family of devices," which will be defined by what Ive described as "a new design movement."

Perhaps the only thing we know for sure about this product is that it won't come with a screen. Altman has been critical of the amount of time we spend looking at screens -- but is there room on the market for devices that tempt us away from our screens? "Except smartwatches, no new product category has emerged since the smartphone," said Husson. "There is room for disruption and innovation."

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This not-a-phone, not-a-wearable currently exists to us only as an amorphous third thing -- and likely will do for some time yet. Keep checking back for more rumors and updates, which we will add as we get more information about what kind of device may rule our lives in the near future, just as the smartphone does today.

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# OpenAI Unleashes ChatGPT Agent to Be Your Personal Assistant

ChatGPT Agent can connect to your various services to take care of complex tasks for you.



**Imad Khan**

July 17, 2025 10:59 a.m. PT

2 min read





Stephen Shankland/CNET/OpenAI

OpenAI has launched ChatGPT Agent for Pro, Plus and Team users. It's an AI-powered personal assistant that connects to your various services online to help complete tasks for you, the company said in a livestream Thursday.

Using the power of OpenAI's "reasoning" o3 model, which has deep research capabilities, along with Operator, ChatGPT Agent can go step-by-step from one task to the other to put together complex reports. ChatGPT Agent can visualize what it's doing via a virtual computer interface. There, you can see its train of thought, what it's browsing on the net and what systems it's connecting to.

During the livestream, OpenAI members demoed what it would be like to use ChatGPT Agent to figure out travel plans for a wedding. The tool was able to check the wedding site provided, find the date, find nearby hotels, check out what the weather might be like, browse other websites, look for tuxedos on a Nordstrom web page, look for wedding gifts, and present a final report. The user could also interject to ask for help in finding a pair of men's black shoes.

ChatGPT Agent can connect to various services, like your email, calendar, news apps and others. OpenAI says safety is foundational to this model and that ChatGPT Agent will request your permission before doing anything sensitive, like making purchases or submitting forms. ChatGPT agent won't perform "high-risk tasks" like engaging in financial transactions or dealing with legal advice. The system will also reject "harmful or illegal requests," OpenAI said.

The company didn't immediately respond to a request for comment.

The debut of ChatGPT Agent is the next step in the pursuit of artificial general intelligence, or AGI. These are AI models that would be so advanced they'd have a general understanding of the world around them and could outcompete humans in tasks. AI systems now, while seeming smart, actually have no understanding of the world and simply arrange words mathematically in a manner that best mimics human speech, based on certain criteria. Agentic AI systems, ones that can go out and perform complex tasks across various systems, have been seen as a major step toward achieving AGI.

Because agentic AI can better mimic complex human trains of thought, these systems can be given a task and sent off to get it accomplished. Though it's hard to measure the economic impact of billions of AI agents doing the work once done by humans, entire industries will be affected.



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